

Getting started

From the SourceLace manual: SourceLace lets the people in your organization ask questions of your business systems, such as Salesforce, SAP, HubSpot, Snowflake or your own databases, from the AI app they already use, with their own permissions in each system.

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The latest version is at <https://sourcelace.onrender.com/docs>

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What SourceLace is

SourceLace sits between an AI app and your business systems. When someone asks "Which renewals over \$50,000 close this quarter?", their AI app asks SourceLace, SourceLace runs a read-only query against the system **as that person**, and the answer comes back with the rows it used.

Three things are true for every request:

- **Each person uses their own login.** People connect each system with their own account, so the system's own permissions, roles and sharing rules decide what they see. SourceLace never uses a shared admin account where per-person sign-in exists.
- **Reading is the default.** Queries are checked before anything is sent, and anything that could change data is refused. Changes are possible only where your admin turns them on, and only after the person sees a preview and confirms it.
- **Nothing is copied into a database.** Results are held in memory for up to 30 minutes, so they can be combined or charted, and are then gone. Every call is written to your organization's audit trail (what was asked, never the data that came back).

Two ways to use it

You can use SourceLace from any AI app that supports the Model Context Protocol (MCP), and from the SourceLace app. Both use the same sources, the same permissions and the same audit trail.

From your own AI app (MCP)

SourceLace works with Claude, ChatGPT, Cursor, VS Code, and any other MCP client, including an organization's own agent on its own model. Add SourceLace as a connector (some apps call it a "custom connector" or an "MCP server") with this address:

`https://sourcelace.onrender.com/mcp`

The app opens a browser window the first time, so you can sign in to SourceLace (with Google, Microsoft, or your organization's single sign-on). After that it stays signed in.

Where to add it, in the apps people use most (menu names change from time to time):

App	Where
Claude (claude.ai, desktop, mobile)	Settings → Connectors → Add custom connector. Name it SourceLace, paste the address, leave the advanced OAuth fields empty, then Connect . On Team and Enterprise plans an owner may need to add it first under Admin settings → Connectors .

App	Where
ChatGPT	Turn on Developer mode under Settings → Apps & Connectors → Advanced settings , then Create a connector with the address and OAuth authentication.
Cursor	Cursor Settings → MCP → Add new MCP server , with the address as its url. Click Login next to SourceLace.
VS Code	Run MCP: Add Server from the Command Palette, choose HTTP , and paste the address.
Any other MCP client	Use the address above. SourceLace follows the MCP authorization standard: the client registers itself and signs you in with PKCE.

When SourceLace is connected, the AI app sees SourceLace's tools (such as `list_sources`, `query` and `search_docs`). SourceLace itself sends nothing to any AI model in this setup: your AI app and its provider decide what happens to the answers, under your agreement with them.

From the SourceLace app

Open [the SourceLace app](#) and sign in. The app has a chat assistant that uses the same tools, plus pages for your sources, skills, projects and status. Admins also manage people, sources, groups, settings and the audit trail there. See [Admin guide](#).

The app's assistant is powered by Claude, through Anthropic's API, unless your admin has entered your organization's own Anthropic or OpenAI key (see [AI settings](#)).

Your first five minutes

1. **Sign in** to SourceLace, in the app or by adding the address above to your AI app. If you are told you are not allowed in, your organization's SourceLace admin needs to invite you or add your email domain.
2. **See your sources.** Ask "Which SourceLace sources do I have?" (the `list_sources` tool), or open **Data Sources** in the app. Each source shows whether you have connected it.
3. **Connect a source.** Ask "Connect salesforce:prod", or click **Connect** on the Data Sources page. A sign-in page opens for that system; sign in with your own account there. Databases open SourceLace's own sign-in form instead, for your own database login.
4. **Ask a question.** For example: "Show my open opportunities over 50,000, newest first." The AI looks up the fields first, writes a query in the system's own language, and shows you the rows.
5. **Combine and share.** Ask to join two results (for example Salesforce accounts with SAP customers), draw a chart, or, in the SourceLace app, make a Word, PowerPoint or PDF file from the results.

Changing records

Some sources can create or update records (and a few can delete them: Salesforce, HubSpot, and the email drafts SourceLace made), but only:

1. where your admin has turned on **Allow changes** for that source and listed the objects that can change;

2. after the AI shows you a **preview** with each field's current and new value; and
3. after **you confirm**. In the SourceLace app you click **Apply** on the preview card. In other AI apps, SourceLace asks you directly when the app can show its confirmation box; otherwise the preview includes a six-letter code that you type into the chat.

A preview expires after 10 minutes. If someone changed the record after the preview, SourceLace refuses and asks for a fresh preview. The source's own permissions still apply to every change.

Skills

Your organization can write **skills**: step-by-step how-tos the AI follows for a task, such as building a QBR deck or a pipeline review. Admins share skills with everyone, and anyone can keep their own. Skills work in the SourceLace app (the **Skills** page) and in every MCP client (the `list_skills` and `get_skill` tools). A skill cannot widen what anyone may read or change.

Asking about SourceLace itself

This manual is built into SourceLace. Ask your AI app or the SourceLace assistant questions such as "How do I connect Snowflake?" or "How long does SourceLace keep my data?": it searches this manual with the `search_docs` tool and answers with a link to the page. You can also download any page, or the whole manual, as a PDF from [the docs site](#).

Which systems SourceLace connects to

See [Connecting your systems](#) for the full list, who sets each one up, and what people can read and change in each.